



LyondellBasell



Paving the way to the circular ~~future~~ present

We make circular and low carbon
solutions work for business

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How can we accelerate packaging circularity while meeting regulatory needs and consumer expectations?

Regulatory clarity drives confidence – and action

Regulations are not coming... They are already here

PPWR: A regulation shaping packaging for **448 MM EU consumers**:

100% Recyclable packaging by 2030 ²	35% Minimum recycled content by 2030 ² Non-contact sensitive applications	10% Minimum recycled content by 2030 ² Contact sensitive applications
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Regulations are not coming. They are already here

We must build capacity for recycled content

2022 supply	Supply expected by 2030	Upstream supply shortage	Demand expected by 2030
3 MM tons	9 MM tons	4 MM ton supply gap	13 MM tons

Meeting these PPWR targets will require significant investment across Europe's recycling ecosystem

Valorize your investments in circularity and decarbonization

Just say it!

Opportunity to valorize sustainability investments with consumers is tangible

90% of consumers are more likely to buy from brands with sustainable packaging ¹	13% Increased willingness to pay for 100% recycled plastic packaging ²	15% Increased willingness to pay for Lower Carbon packaging ²
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Opportunity to valorize sustainability investments with consumers is tangible



Regulations are not coming... They are already here



PPWR: A regulation shaping packaging for **448 MM EU consumers**¹:



100%

Recyclable packaging by 2030²



35%

Minimum recycled content by 2030³

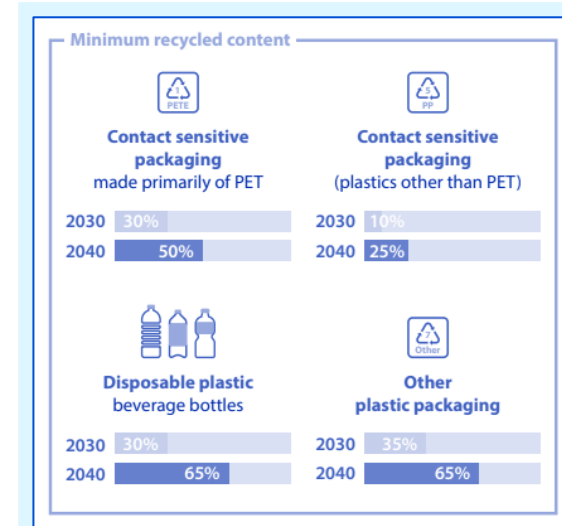
Non-contact sensitive applications



10%

Minimum recycled content by 2030⁴

Contact sensitive applications



<https://erp-recycling.org/wp-content/uploads/2025/05/PPWR-Packaging-and-Packaging-Waste-Regulation-EN-final.pdf>

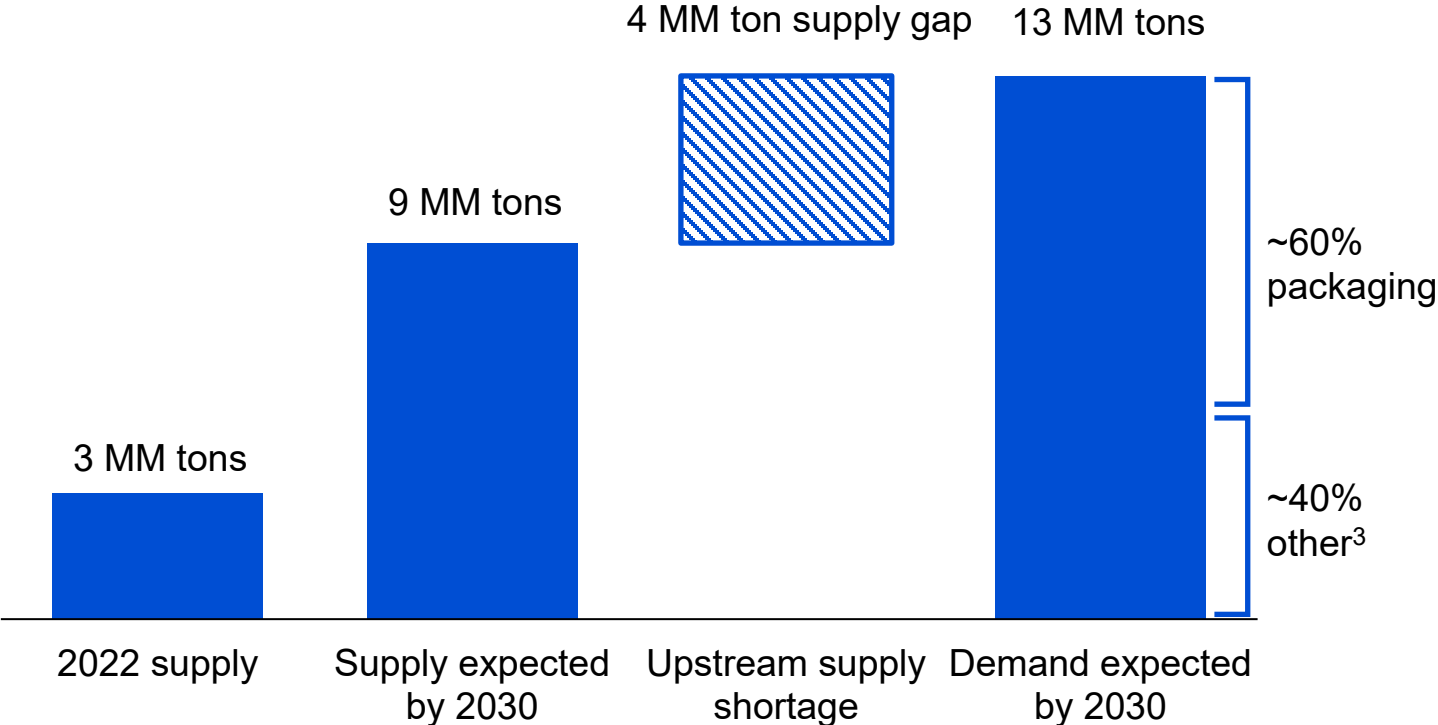


- As of 2025, population resident in the 27 Member States of the European Union. The Packaging and Packaging Waste Regulation (PPWR) applies to all EU Member States, meaning it affects the entire population of the European Union.
- Recyclability should serve as the basis for the modulation of the EPR fees 18 months after the entry into force of the delegated legal and implementing acts. From 2030, all packaging with < 70% recyclability will be prohibited.
- Minimum Recycled Content Requirement by 2030 for Other plastic packaging (non-contact sensitive)
- Minimum Recycled Content Requirement by 2030 for Other plastic packaging (Contact sensitive)

Circular plastics market is structurally attractive

Upstream supply gap is creating a tight market¹

Market assessment for circular plastics^{1,2}



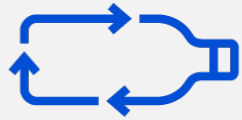
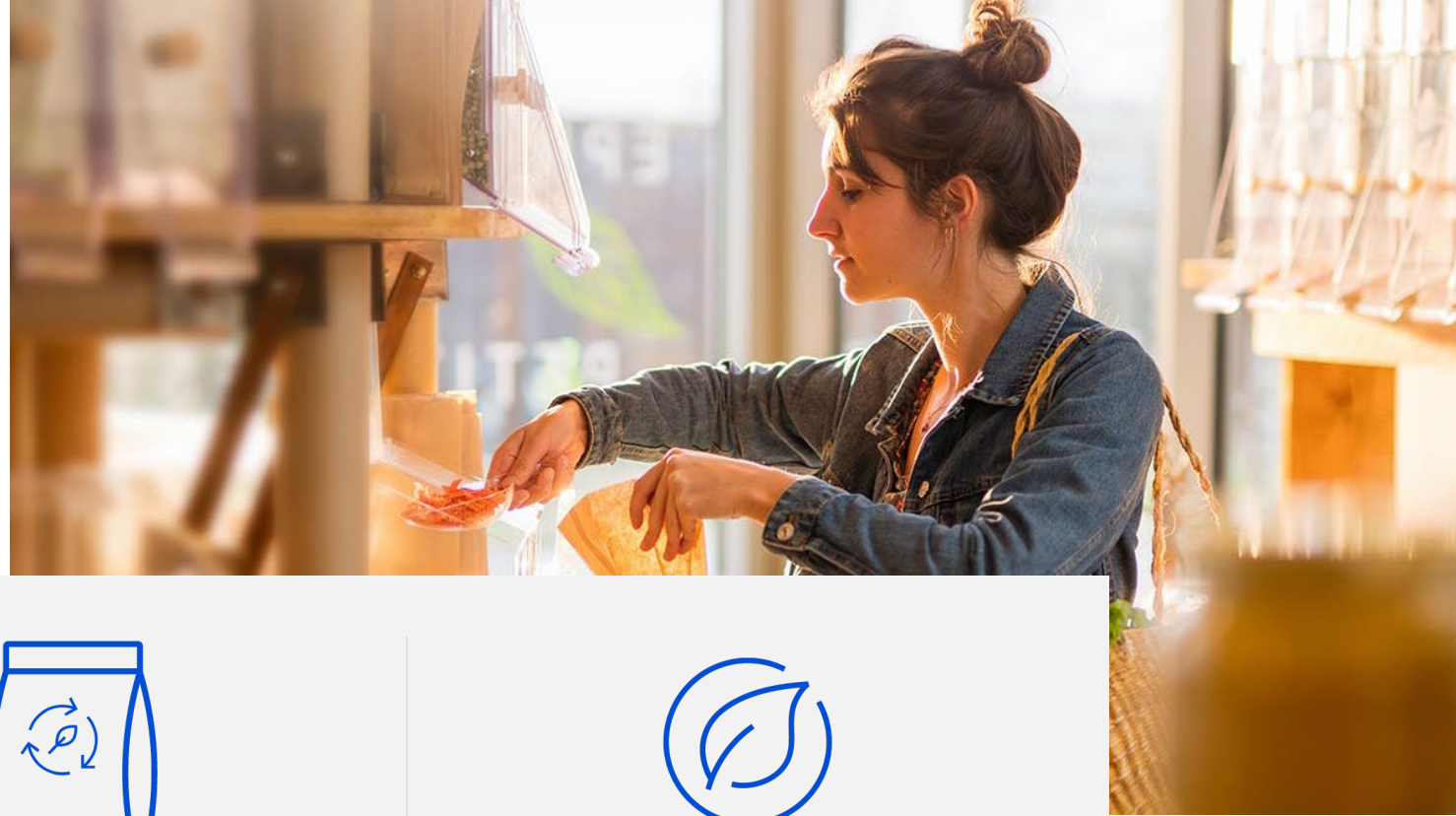
- Consumer preferences driving robust demand growth for LYB’s CLCS products
- European regulatory developments, including PPWR, bolstering demand for recycled content in packaging
- Infrastructure build-out for gathering, sorting and processing plastic waste lagging demand growth for recycled polymers
- Brand owners’ scaling back plans for usage of recycled content due to slower growth in supply



1. Sources: Townsend and Conversio (EU); ACC, TRP, CMA (US); CLCS internal insights
2. In North America and Europe
3. Other includes automotive, durable goods and construction

Just say it!

Opportunity to valorize sustainability investments with consumers is tangible



90%

of consumers are more likely to buy from brands with **sustainable packaging**¹



13%

Increased willingness to pay for **100% recycled plastic** packaging²



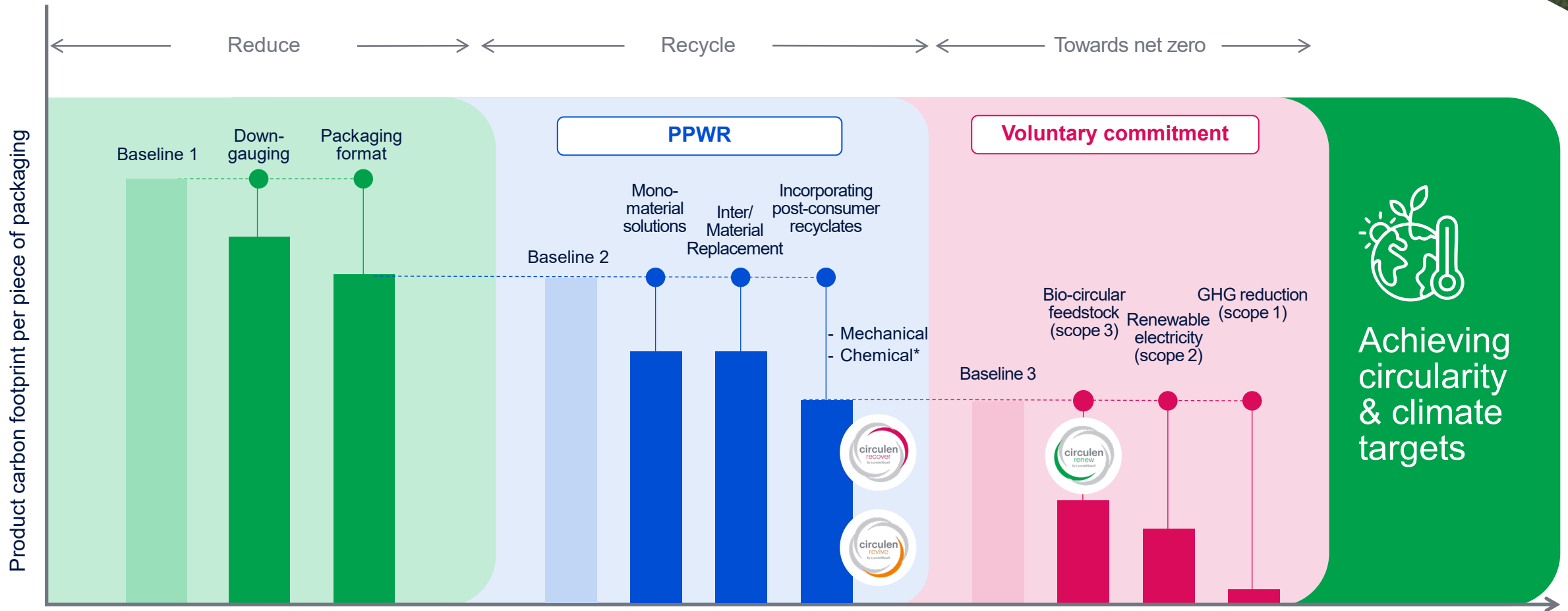
15%

Increased willingness to pay for **Lower Carbon** packaging²



1. Source: <https://www.futuremarketinsights.com/reports/sustainable-packaging-market>
2. Bain & Co: Bain Global ESG Conjoint Survey 2023 – Data analyzed on the Confectionary & Snacks category.

Towards a circular and low carbon future



Disclaimer: For illustrative purposes only; hypothetical example combines results from multiple solutions; actual reduction may vary.
 * Based on an LCA 'system expansion' approach taking into account emissions from waste management

The *Circulen* portfolio offers multiple pathways to achieve virgin plastic and PCF reduction goals



Recycled polymers using plastic waste converted through **mechanical recycling**

Recycled polymers sourced from plastic waste converted through **chemical recycling**

Polymers sourced from **bio-circular feedstock**

Direct inclusion of post-consumer recycled content up to 100%

The shortest path from plastic waste to recycled polymer

PCF reduction compared to virgin polymers

Chemical recycling complements mechanical recycling by diverting hard-to-recycle plastics from the waste stream

Up to **100%* attributed circular content** on an ISCC PLUS-certified mass balance basis

Retains regulatory compliance of virgin resins

Replacing fossil-based feedstocks with bio-circular feedstocks derived from bio-mass waste and residues

Up to **100%* attributed bio-circular content** on an ISCC PLUS-certified mass balance basis

Retains regulatory compliance of virgin resins

Substantially lower PCF compared to virgin polymers



*PP and PE grades can be attributed at up to 100%; Catalloy grades can be attributed up to 95%

CirculenRevive polymers: Production process

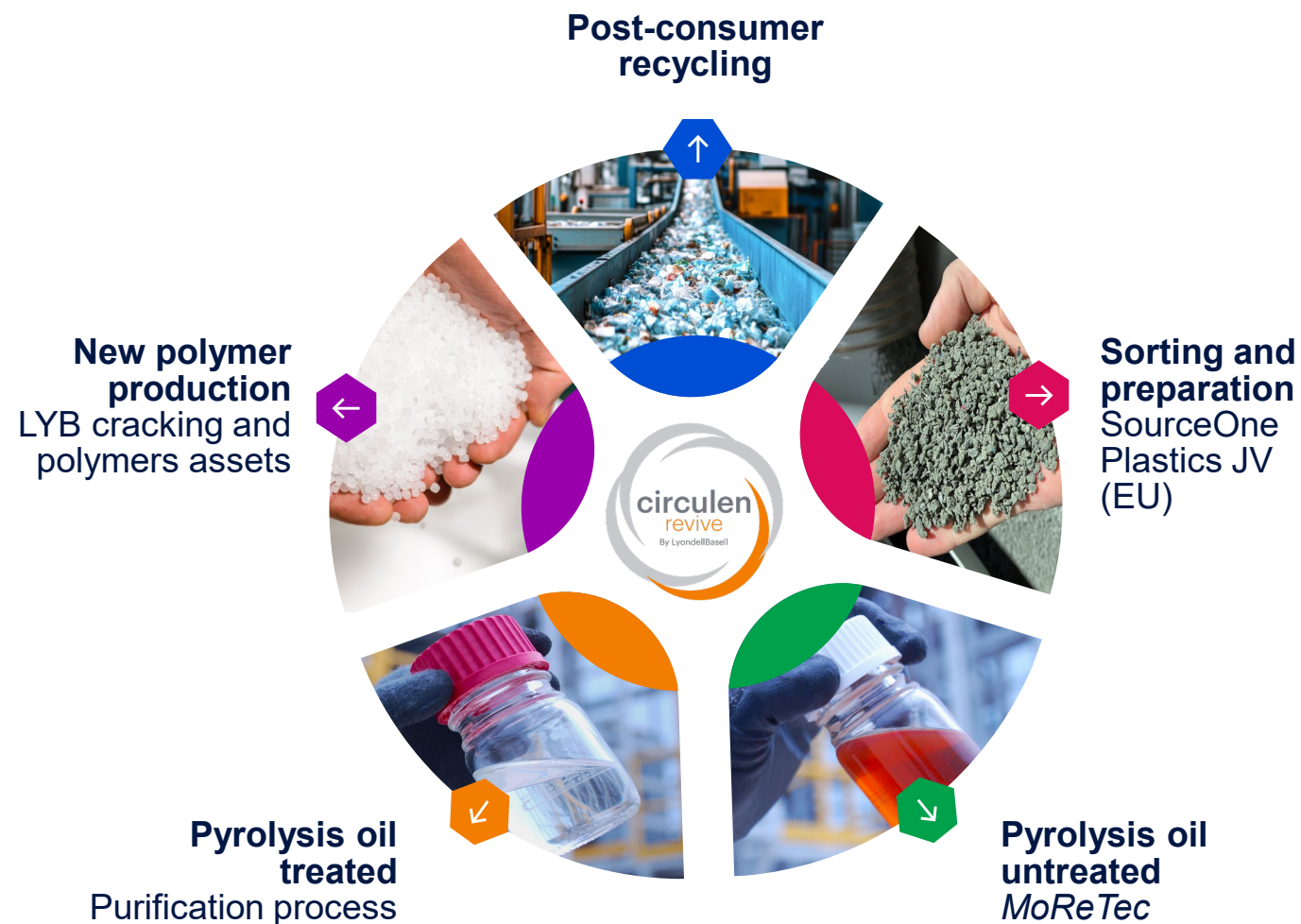
From advanced plastic waste sorting to new polymers in the LYB integrated ecosystem



Consumer packaging



Post-consumer recycling

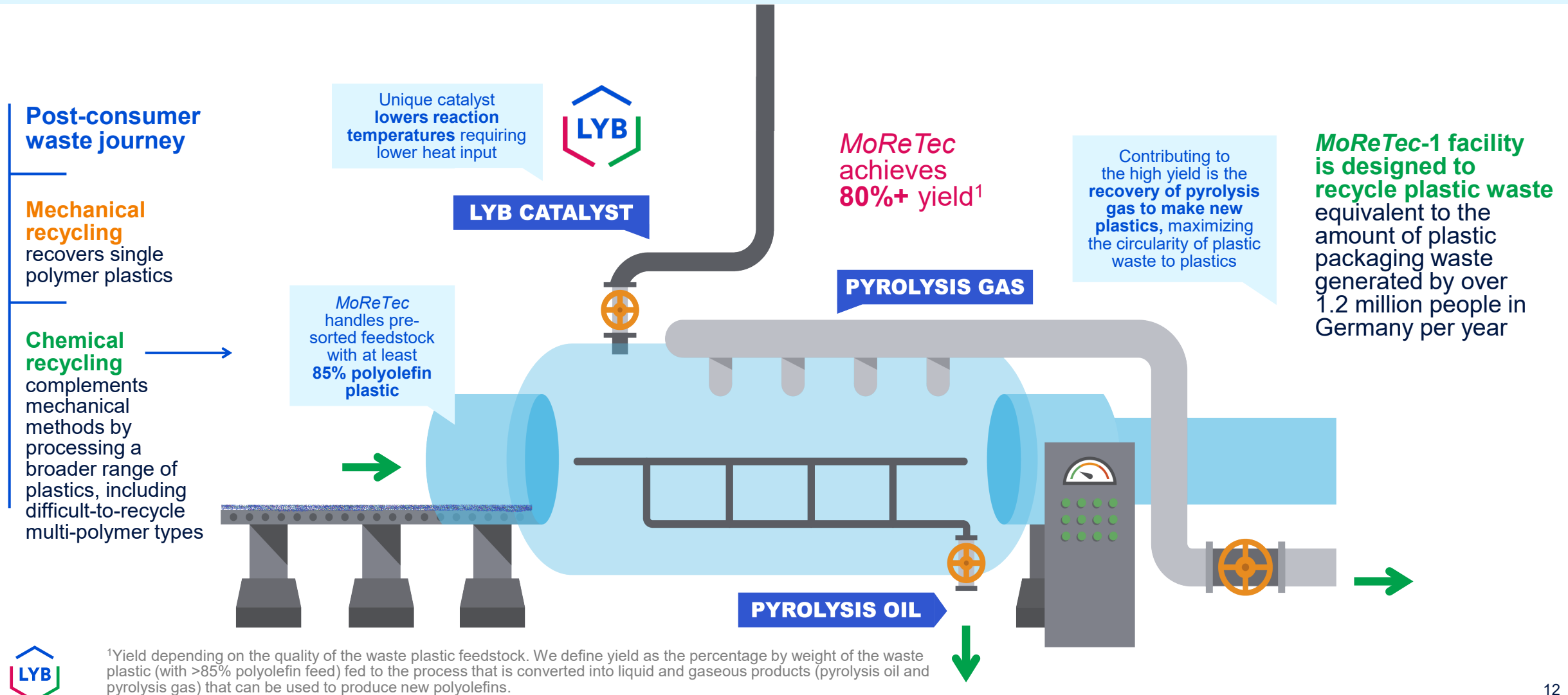


Chemically recycled feedstock is mixed with conventional feedstocks in our process and attributed to *CirculenRevive* products using a mass balance approach certified according to the ISCC PLUS standard.

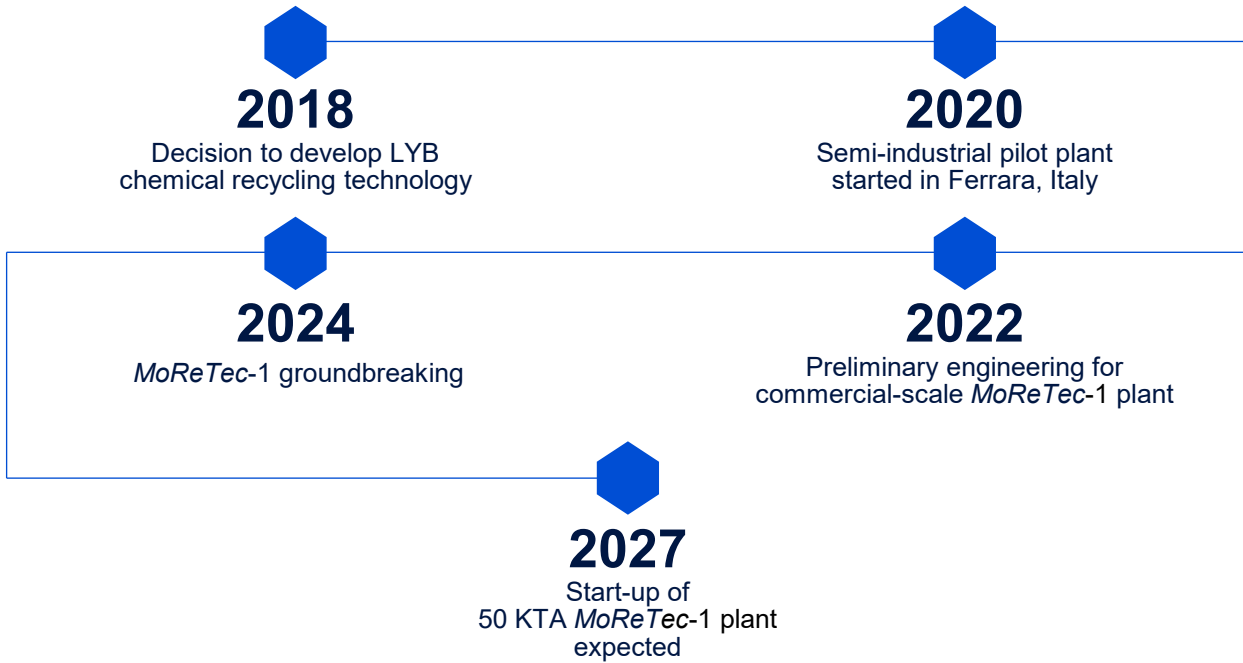


MoReTec: A differential chemical recycling technology

Construction of the first commercial facility in Germany: 50kt single train



MoReTec: Path to commercialization



Leveraging our unique innovation capabilities

Integrated R&D team rapidly developed *MoReTec* technology from concept to pilot scale to address the need for scalable circular solutions that do not exist today



Utilizing our integrated ecosystem

MoReTec-1 to be built at our Wesseling site near Cologne, Germany with benefits for plastic waste sourcing, yield and energy integration



Potential licensing opportunities

Technology drives value and global growth for LYB through partnerships

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Solutions for a
better tomorrow
